

The European market potential for pants

The value of the European pants import market is estimated at €35.6 billion, making it a strong apparel subsegment. Men's and women's pants products account for very similar numbers, making both segments potentially interesting for pants manufacturers.

Contents of this page

1. [Product description](#)
2. [What makes Europe an interesting market for pants?](#)
3. [Which European countries offer most opportunities for pants?](#)
4. [What trends offer opportunities or pose threats on the European pants market?](#)

The best opportunities for the import of pants to the EU are in Germany, Spain and the Netherlands, who are the biggest importers of pants in the EU and belong to the strongest importers of pants from developing countries. France also belongs to the top 3 importers of pants from developing countries. Furthermore, Western European countries show higher potential for market entries than Eastern European countries in terms of value and volume.

Currently, manufacturers should clearly decide if they would like to produce very standardised trousers and pants or would like to go for more elaborate designs and materials.

The sourcing of pants from developing countries is still highly accepted in Europe, accounting for 29.4% of all imports with an upward trend.

1. Product description

The pants segment includes men's and woman's trousers, bib and brace overalls, breeches and shorts.

Men's pants include Men's or Boys' Trousers, Bib and Brace Overalls, Breeches and Shorts of wool or fine animal hair, cotton, synthetic fibers, textile materials, artificial fibers, knitted or crocheted (HS Codes: 61034100, 61034110, 61034190, 61034200, 61034210, 61034290, 61034300, 61034310, 61034390, 61034900, 61034910, 61034991, 61034999), Men's or Boys' Trousers, Bib and Brace Overalls, Breeches and Shorts of wool and fine animal hair, synthetic fibers, artificial fibers, textile materials, not knitted or crocheted (HS Codes: 62034110, 62034130, 62034190, 62034319, 62034339, 62034390, 62034919, 62034939, 62034950, 62034990), Men's or Boys' Industrial and Occupational Trousers, Bib and Brace Overalls and Breeches of cotton, synthetic fibers, artificial fibers, not knitted or crocheted (HS Codes: 62034211, 62034251, 62034311, 62034331, 62034911, 62034931), Men's and Boys' Trousers; Bib and Brace Overalls, Breeches and shorts of cotton denim, cotton-cut corduroy, cotton, not knitted or crocheted (HS Codes: 62034231, 62034233, 62034235, 62034259, 62034290).

Women's pants include Women's or Girls' Trousers, Bib and Brace Overalls, Breeches and Shorts of wool or fine animal hair, cotton, synthetic fibers, textile materials, artificial fibers, knitted or crocheted (HS Codes: 61046100, 61046110, 61046190, 61046200, 61046210, 61046290, 61046300, 61046310, 61046390, 61046900, 61046910, 61046991, 61046999), Women's or Girls' Trousers, Bib and Brace Overalls, Breeches and Shorts of wool and fine animal hair, synthetic fibers, artificial fibers, textile materials, not knitted or crocheted (HS Codes: 62046110, 62046180, 62046185, 62046190, 62046318, 62046319, 62046339, 62046390, 62046918, 62046919, 62046939, 62046950, 62046990), Women's or Girls' Industrial and Occupational Trousers and Breeches of cotton, synthetic fibers, artificial fibers, not knitted or crocheted (HS Codes: 62046211, 62046251, 62046311, 62046331, 62046911, 62046931), Women's and Girls' Trousers; Bib and Brace Overalls, Breeches and shorts of cotton denim, cotton-cut corduroy, cotton, not knitted or crocheted (HS Codes: 62046231, 62046233, 62046235, 62046239, 62046259, 62046290).

2. What makes Europe an interesting market for pants?

Europe is a significant global importer of pants. In 2019, the value of pants imports to Europe accounted for €35.6 billion, up from €27.0 billion in 2014. Over the last five years, the value of the EU's pants imports has grown an average of 5.7% annually, which is in line with the overall 5.8% import growth for the entire apparel industry, as reported in a demand analysis published by CBI in 2019). The pants category has shown a steady import growth in the last five years. The demand for pants is expected to continue growing again in 2021 after a significant decline in 2020 due to the coronavirus.

Figure 1: European Union Pants Imports

in € billion



Source: Eurostat

Table 1 shows women's pants are the larger product segment, with 6.1% in average annual growth since 2014, the women's pants segment is growing faster than the men's pants segment and shows more future potential.

Table 1: Pants imports to EU by segment, 2019 EUR value; % share of denim; average five-year compound growth

Category	Value	% Share of Denim	5-yr growth average
Men's pants	€16,923 m	47.5%	5.3%
Women's pants	€18,705 m	52.5%	6.1%
Total	€35,628 m	100%	5.7%

Source: Eurostat

The EU is also a large re-exporter of pants. In 2019, it exported €23.2 billion worth of pants (up from €16.3 billion in 2014). The EU pants export market has been growing at an average yearly rate of 7.3% between 2014 and 2019. The biggest EU exporters in 2018 were Germany (€5.0 billion), Spain (€3.3 billion), Italy (€2.7 billion),

the Netherlands (€2.4 billion), Belgium (€1.7 billion) and France (€1.4 billion). Together, these six countries represent over 71% of EU's pants exports. Germany, Spain, and the Netherlands have seen the strongest export growth within this group, with an average yearly increase between 10.2% and 12.1%. In comparison, Belgium and Italy have been growing at a much lower rate, by only about 3.0% per year over the last five years.

Figure 2: European Union Pants Exports

in € billion

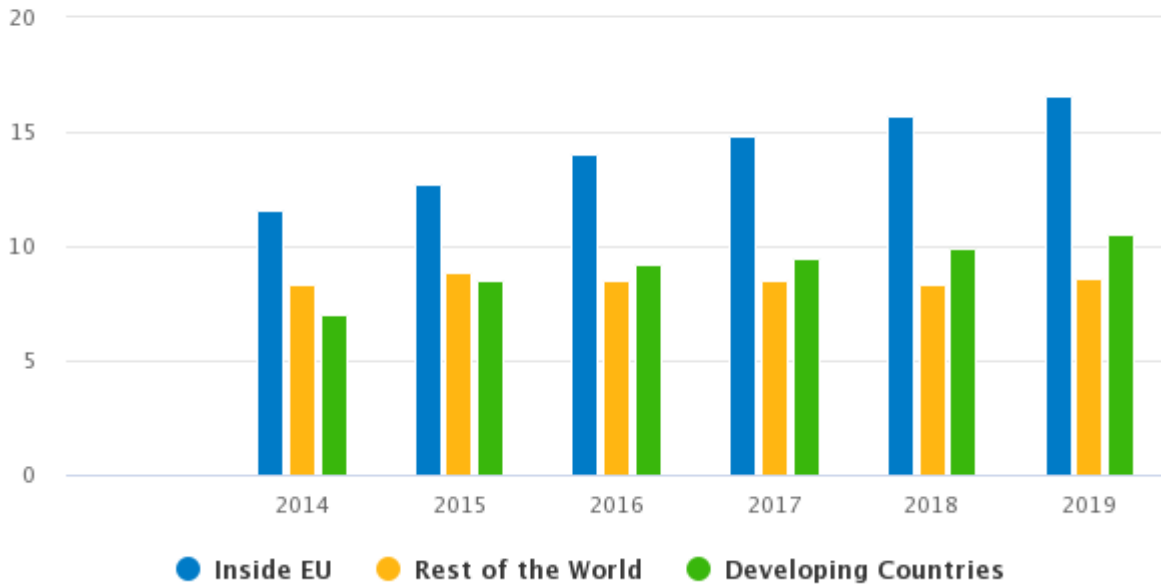


Source: Eurostat

Currently, of the value of EU pants product imports, 53.5% originates from outside the EU, and 46.6% from trade within the EU. In 2019, developing country suppliers contributed 29.4% of all pants imports into the EU in terms of value (up from 25.9% in 2014) and suppliers from the rest of the world accounted for 24.2% of the import value (down from 30.9% in 2014). The value of EU pants imports originating from developing countries corresponded to €10.5 billion in 2019 and has grown at an average yearly rate of 8.4% since 2014. This demonstrates that there is a strong demand for pants from developing countries.

Figure 3: European Union Pants Imports by Origin

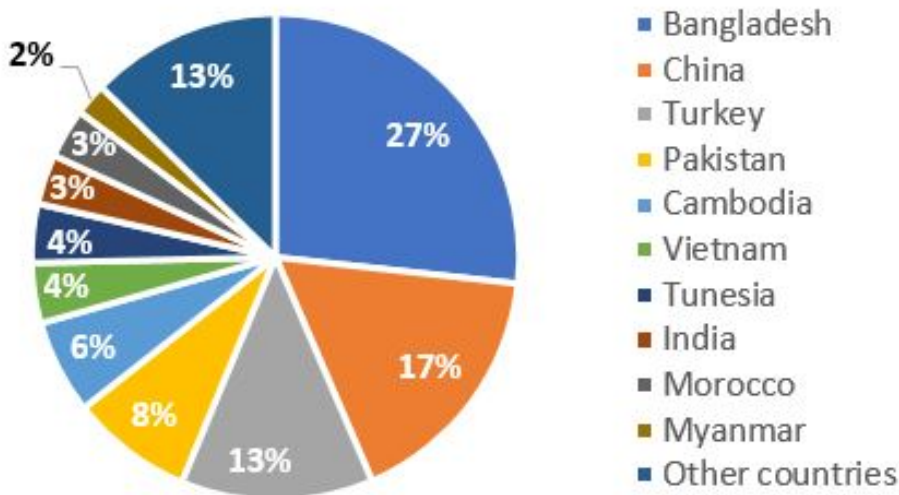
in € billion



Source: Eurostat

Figure 4 shows that Europe’s Extra-EU pants product import market is dominated by Asian countries, with Bangladesh, China, and Turkey being the top three exporting countries. Together, these three countries account for 57% of all pants imports into the EU.

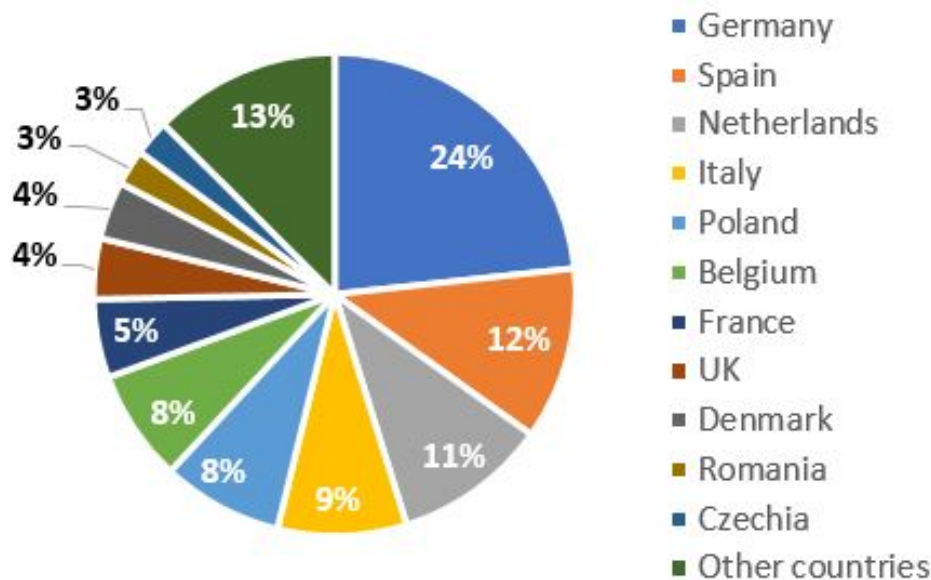
Figure 4: 2019 Extra-EU Imports of Pants by market share of exporting countries



Source: Eurostat

Figure 5 shows that Intra-EU exports of pants is dominated by Germany, followed by Spain and the Netherlands. The rest of the market appears to be very fragmented between the different countries of the EU. Figure 5 shows that Intra-EU exports of pants is dominated by Germany, followed by Spain and the Netherlands. The rest of the market appears to be very fragmented between the different countries of the EU.

Figure 5: 2019 Intra-EU Imports of Pants by market share of exporting countries



Source: Eurostat

The figures shown produce a top 10 of Intra-EU and Extra-EU exporters importing to countries in the European Union. These countries act in direct competition to each other, fighting for the biggest market share in pants.

Table 2 shows that all top 10 countries increased their market share in the last 5 years, except for Romania (-2.7%). Poland (14.8%), Spain (13.8%) and Germany (10.7%) saw double-digit growth.

Table 2. Top 10 Extra-EU and Intra-EU pants exporters to the European Union, 2019. Value in Euro, five-year average yearly growth.

Country	Value	5-yr growth	Country	Value	5-yr growth
Top Extra-EU Pants Exporters			Top Intra-EU Pants Exporters		
Bangladesh	€5.2 b	↑ 9.7%	Germany	€4.0 b	↑ 10.7%
China	€3.3 b	↓ 3.0%	Spain	€2.0 b	↑ 13.8%
Turkey	€2.5 b	↑ 2.6%	The Netherlands	€1.8 b	↑ 8.2%
Pakistan	€1.6 b	↑ 9.8%	Italy	€1.5 b	↑ 2.9%
Cambodia	€1.2 b	↑ 14.0%	Poland	€1.4 b	↑ 14.8%
Vietnam	€775 m	↑ 10.0%	Belgium	€1.3 b	↑ 3.9%
Tunisia	€764 m	↓ 2.1%	France	€901 m	↑ 5.7%

India	€655 m	↑ 3.6%		United Kingdom	€698 m	↑ 3.9%
Morocco	€645 m	↑ 0.8%		Denmark	€666 m	↑ 6.2%
Czech Republic	€419 m	↑ 8.6%		Romania	€423 m	↓ 2.7%

Source: Eurostat

Impact of Coronavirus on the European apparel market in 2020

The COVID-19 epidemic is strongly influencing the sales and processes within all segments of the fashion industry. Europe is [facing an economic decline of more than 7%](#) in total. In most European countries, local shops had to close during lockdowns, depending heavily on the support payments from the governments, the offer of heavy discounts and a seamless shift to digital channels. Pants have not been as badly affected as other apparel segments, due to the available soft material that are preferred for working from home. Nevertheless, consumers prefer to buy pyjama pants during the crises, [causing the sales of these pants to increase by 143%](#) in the first quarter of the year, while normal pants declined by 13%. Still, eco-friendly pants in particular might decrease in terms of demand [since many sellers might look for cost-effective solutions to rebuild their everyday business](#) after the COVID-19 pandemic.

Nevertheless, digital sales cannot compensate the overall losses experienced by the fashion brands and has led to a decrease in import orders. A total lockdown in important export countries like China and Bangladesh did [also influence the availability of orders until April 2020](#). Bangladesh is expected to experience a loss of roughly USD 6 billion due to major difficulties in delivering their products to the EU and US due to the coronavirus and [import restrictions](#). However, digital marketplaces like Zalando, AboutYou and others benefited from the situation (as reported in the [first quarter financial report by Zalando](#), for example and [other brands](#)). During the coronavirus crisis, fashion shows, festivals, summits and other events (for example the Paris June Fashion Show and the Ralph Lauren Fashion Show) have been [cancelled](#) or [postponed](#) due to governmental regulations.

As shops have started to reopen in Europe in May 2020, most brands are slowly recapturing their business as usual. Nevertheless, the brands can hardly estimate how much and how quickly the market will recover in the near future, considering the strong dependency on the future progression of the disease. Once the spread of the pandemic has been limited, the import of denim is expected to return to its previous level or even higher. Leading brands in Europe do not expect a lasting change in consumer behaviour (as stated in [several interviews](#) with brand executives). Further tips and information on the impact of the Coronavirus have been collected in an analysis by CBI ([published in April 2020](#)).

Tips:

Target men's trousers and pants, as this is the more stable market, before entering the much more dynamic women's segment. Both segments are currently growing in imports and likewise show great potential for manufacturers to enter the market.

Compete with Intra-EU exporters by proving yourself to be a reliable partner who can cut costs and deliver quality.

Since Bangladesh is currently the strongest developing country, make sure to understand the functionality of the trade between Bangladesh and Europe.

Prove yourself to be an equally reliable partner as Eastern European countries. Many European countries are switching to Intra-EU production due to the growing capabilities in Eastern Europe, which

could pose a threat for you.

Profit from the pre-existing high level of involvement of developing countries in the business by developing local business networks with other companies from your country and region. Collaborate with locally situated associations and form synergies.

Observe the changes and regulations concerning the coronavirus. Most regulations are made on a national and federal level and can become both a barrier and an opportunity for you. The market may need to be reorganised after the coronavirus crisis, which might be an interesting opportunity for you to enter new markets.

Read the CBI news article "[Running an apparel factory in times of coronavirus](#)", which contains specific information on where to find updates on coronavirus regulations for the top European Apparel importing countries.

3. Which European countries offer most opportunities for pants?

Western European markets are currently larger importers of denim products than the Central and Eastern European countries. Table 3 shows the top 10 pants import markets in the EU. Germany is the biggest importer, but Poland, Austria, Spain, and the Netherlands had higher growth rates in the last five years. Poland remains the only Eastern European country in the top 10, with a robust average annual growth of 12.9% since 2014. The top 6 countries together account for 71.5% of pants imports, and saw average annual growth of 6.9% over the last 5 years.

Table 3: Top 10 EU importers of Pants, 2019 EUR value; average yearly growth

Country	Value	5-yr growth
Germany	€7.4 b	↑ 5.2%
Spain	€4.2 b	↑ 8.6%
France	€4.0 b	↑ 3.7%
Netherlands	€3.6 b	↑ 8.2%
United Kingdom	€3.5 b	↑ 2.3%
Italy	€2.7 b	↑ 4.3%
Belgium	€1.7 b	↑ 2.9%
Poland	€1.6 b	↑ 12.9%
Austria	€1.3 b	↑ 8.7%
Sweden	€905 m	↑ 4.8%

Source: Eurostat

The top 10 EU importers of denim from developing countries are shown in table 4. Spain stands out with a 48% share of its imports being from developing countries, but each of the countries have experienced an overall growth in imports since 2014. The leading country in terms of growth has been Poland, with an average annual growth of 44% from 2014 to 2019, showing great potential to become one of the leading countries in the future.

Table 4: Top 10 EU importers of Pants from the Developing Countries, 2019 EUR value; average yearly growth

Country	Value of Developing country imports	5-yr growth	Developing country share of imports
Germany	€2.3 b	↑ 9.2%	31.1%
Spain	€2.0 b	↑ 11.6%	48.2%
United Kingdom	€1.3 b	↑ 4.7%	38.2%
Netherlands	€1.2 b	↑ 7.1%	33.4%
France	€1.1 b	↑ 6.6%	26.7%
Italy	€867 m	↑ 2.0%	31.6%
Belgium	€457 m	↑ 4.3%	26.9%
Poland	€331 m	↑ 44.1%	20.8%
Denmark	€233 m	↑ 22.8%	26.4%
Sweden	€232 m	↑ 12.1%	25.6%

Source: Eurostat

Out of the top 6 countries, men's as well as women's segments have recorded good growth in recent years, and show similar potential for the future. For most countries, women's pants are the bigger subsegment, showing greater growth in the last five years. The men's subsegment is only bigger in Italy and the Netherlands, but women's pants show higher growth rates. Both segments in these six countries are expected to experience single-digit growth in volume and value in the future.

Germany

Table 5: 2019 Imports of Pants to Germany by segment with five-year growth, average import unit price and five-year price evolution

GERMANY	2019 Value (€)	5-year growth	Average unit price (€)	5-year price change

Men's Pants	€3.689 m	↑ 5.6%	€11.28	+€1.03
Women's Pants	€3.741 m	↑ 4.9%	€6.35	-€0.03
TOTAL:	€7.430 m	↑ 5.2%	€8.11	+€0.23

Germany is the largest pants import market in Europe. In 2019, the value of its pants imports amounted to €7.4 billion (up from €5.7 billion in 2014), corresponding to 916 million units of clothing. In the last five years, the value of Germany's pants imports has grown at an average rate of 5.2% per year, while the import volume has grown by 25.6% per year. Popular pants brands from Germany include [Meyer Hosen](#), [Gerry Weber](#), [Jeans Fritz](#), [MMX](#), [Esprit](#), [Hugo Boss](#), [Tom Tailor](#) and [Marc O'Polo](#).

Men's pants constitute 50% of the whole segment (down from 51% in 2014), followed by women's pants with 50% (up from 49% in 2014). Over the past five years, the men's pants segment has grown at a slightly higher rate than the woman's pants segment, with average yearly growth of 5.6% compared with 4.9%. The men's pants segment is the smaller, but better growing unit in Germany. In the last five years, pants imports have undergone a positive price development, while the price of women's pants decreased very slightly. Men's pants prices per unit are nearly twice as high as women's pants, driving its importance for the market.

The value of imports from developing countries has grown at an average rate of 9.2% per year, with pants from developing countries constituting approximately 31.1% of Germany's imports in this product segment. Germany is currently the largest importer of pants from developing countries, creating great potential for exporting countries.

Spain

Table 6: 2019 Imports of Pants to Spain by segment with five-year growth, average import unit price and five-year price evolution

SPAIN	2019 Value (€)	5-year growth	Average unit price	5-year price change
Men's Pants	€1.585 m	↑ 6.7%	€6.96	-€0.05
Women's Pants	€2.622 m	↑ 9.9%	€5.96	+€0.49
TOTAL:	€4.207 m	↑ 8.6%	€6.30	+€0.29

Spain is the second largest pants import market in Europe. In 2019, the value of its pants imports amounted to €4.2 billion (up from €2.8 billion in 2014), corresponding to 668 million units of clothing. In the last five years, the value of Spain's imports has grown at an average rate of 8.6% per year, while the import volume has grown by 44.6% per year. Popular pants brands from Spain include [Mango](#), [Zara](#), [Stradivarius](#), [Loewe](#), [Massimo Dutti](#), [Pepe Jeans](#) and [Delpozo](#).

Women's pants constitute 62% of the whole segment (up from 58% in 2014), followed by men's pants with 38% (down from 41% in 2014). Over the past five years, the women's pants segment has grown at a higher rate (9.9%) than the men's pants segment (6.7%). The women's pants segment is thus not only the bigger subsegment in Spain, but also the better growing one. In the last five years, the whole segment has undergone a positive price development, while the price of men's pants decreased very slightly.

The value of imports from developing countries has grown an average of 11.6% per year, with pants from

developing countries constituting 48.2% of Spain's imports in this product segment. Spain is currently the second largest importer of pants from developing countries.

France

Table 7: 2019 Imports of Pants to France by segment with five-year growth, average import unit price and five-year price evolution

FRANCE	2019 Value (€)	5-year growth	Average unit price	5-year price change
Men's Pants	€1.815 m	↑ 3.3%	€9.19	+€0.50
Women's Pants	€2.231 m	↑ 4.0%	€6.03	+€0.35
TOTAL:	€4.046 m	↑ 3.7%	€7.13	+€0,38

France is the third largest pants import market in Europe. In 2019, the value of its pants imports amounted to €4 billion (up from €3.5 billion in 2014), corresponding to 567 million units of clothing. In the last five years, the value of France's imports has grown at an average rate of 3.7%, while the import value has grown by 13.5% per year. Popular pants brands from France include [French Connection](#), [Sweet Pants](#), [1083](#), [TheKooples](#), [Dreamact](#), [Le Slip Francais](#) and [Galucebo](#).

Women's pants constituted 55% of the pants imports in 2019, while men's pants accounted for the remaining 45% (down from 46% in 2014). Over the last five years, the women's section has grown at a higher rate (4.0%) than the men's pants segment (3.3%). The women's pants segment is thus not only the bigger subsegment in France, but also the better growing one. In the last five years, the whole segment has undergone a positive price development, while both subsegments grew.

The value of imports from developing countries has grown an average of 6.6% per year, with pants from developing countries accounting for 26.7% of France's imports in this product segment.

The Netherlands

Table 8: 2019 Imports of Pants to the Netherlands by segment with five-year growth, average import unit price and five-year price evolution

NETHERLANDS	2019 Value (€)	5-year growth	Average unit price	5-year price change
Men's Pants	€1.817 m	↑ 7.5%	€9.34	+€2.53
Women's Pants	€1.747 m	↑ 8.9%	€5.87	+€1.36
TOTAL:	€3.564 m	↑ 8.2%	€8.02	+€2.60

The Netherlands is the fourth largest pants imports market in Europe. In 2019, the value of its pants imports amounted to €3.6 billion (up from €2.4 billion in 2014), corresponding to 492 million units of clothing. In the last five years, the value of the Netherlands' imports has grown at an average rate of 8.2%, while the imports volume has grown by 10.7% per year. Popular pants brands from the Netherlands include [MUD](#), [Van Gils](#),

Denham, G-Star Raw, NIK&NIK and Vintage Industries.

Men's pants constituted 51% of the pants imports in 2019 (up from 49% in 2014), while women's pants accounted for the remaining 49% (down from 51% in 2014). Over the last five years, the women's segment has grown at a higher rate (8.9%) than the men's pants (7.5%). In the last five years, the whole segment has undergone a positive price development, while both subsegments grew.

The value of imports from developing countries has grown an average of 7.1% per year, with pants from developing countries constituting nearly 33.4% of the Netherlands' imports in this product segment.

The United Kingdom

Table 9: 2019 Imports of Pants to the United Kingdom by segment with five-year growth, average import unit price and five-year price evolution

UNITED KINGDOM	2019 Value (€)	5-year growth	Average unit price	5-year price change
Men's Pants	€1.602 m	↑ 1.9%	€8.19	+€2.32
Women's Pants	€1.901 m	↑ 2.7%	€6.26	+€1.86
TOTAL:	€3.503 m	↑ 2.3%	€7.01	+€2.03

The United Kingdom is the fifth largest pants import market in Europe. In 2019, the value of its pants imports amounted to €3.5 billion (up from €3.1 billion in 2014), corresponding to 499 million units of clothing. In the last five years, the value of the United Kingdom's imports has grown at an average rate of 2.3%, while the import volume has decreased by 20.4% per year, mainly due to a major decline from 2017 (651 million units) to 2018 (499 million units). In 2019, the market slowly recovered, but remained behind the previously imported volumes. Popular pants brands in the United Kingdom include [Asos](#), [Missguided](#), [COS](#), Spoke, House of Fraser and Selfridges.

Women's pants constituted 54% of the pants imports in 2019 (up from 53% in 2014), while men's pants accounted for the remaining 46% (down from 47% in 2014). Over the last five years, the women's segment has grown at a higher rate than the men's pants. During the same period, the whole segment has undergone a positive price development, while both subsegments grew.

However, the United Kingdom's imports are growing slower than in other top 10 importing countries.

Nevertheless, the value of imports from developing countries has grown at an average of 4.7% per year, with pants from developing countries constituting over 38.2% of the United Kingdom's imports in this product segment.

The United Kingdom formally left the EU on 31 January 2020, and is now in a transition period until 31 December, during which it is still largely treated as an EU member while its trade negotiations with the EU continue. At the moment, it is uncertain whether the UK will continue to provide preferential trade conditions for developing countries and how the United Kingdom's exit from the EU will impact the apparel sector and trade.

Italy

Table 10: 2019 Imports of Pants to Italy by segment with five-year growth, average import unit price and five-year price evolution

ITALY	2019 Value (€)	5-year growth	Average unit price	5-year price change
Men's Pants	€1.431 m	↑ 3.6%	€8.83	+€0.21
Women's Pants	€1.309 m	↑ 5.1%	€6.69	+€0.47
TOTAL:	€2.740 m	↑ 4.3%	€7.66	+€0.34

Italy is the sixth largest pants import market in Europe. In 2019, the value of its pants imports amounted to €2.7 billion (up from €2.2 billion in 2014), corresponding to 358 million units of clothing. In the last five years, the value of Italy's pants imports has grown at an average rate of 4.3% per year, while the import volume grew by 18.2% per year. Popular pants brands in Italy include [Zanella](#), [Diesel](#), [Missoni](#), Atum Italy, Boggi, Rota Pantolini and Parada.

Men's pants constituted 52% of the pants imports in 2019 (down from 54% in 2014), while women's pants accounted for the remaining 48% (up from 46% in 2014). Over the last five years, the women's segment has grown at a higher rate than the men's pants. During the same period, the whole segment has undergone a positive price development, while both subsegments grew.

The value of imports from developing countries has grown an average of 2.0% per year, with pants from developing countries constituting 31.6% of Italy's imports in this product segment.

Tips:

Focus your export efforts on the top six markets: Germany, Spain, France, the Netherlands, the United Kingdom and Italy, because they are both the biggest pants consumers in Europe and the biggest importers of pants from developing countries. All of these countries have a high acceptance of Extra-EU suppliers.

Check the websites of the main providers for each country to understand the requirements, styles and aesthetics for different pants types.

Keep an eye on the development of the United Kingdom (by getting up-to-date information through the [European Commission](#) and [Department for International Trade of the United Kingdom](#) for example), since trade agreements have not been finalised yet, which might significantly influence the import trends from developing countries. Since the UK imported the largest share of skirts and dresses from other European countries, the Brexit could result in new opportunities for other players in the future.

4. What trends offer opportunities or pose threats on the European pants market?

The European pants market follows the general apparel trends related to sustainability, technological innovation, and increased emphasis on corporate and social responsibility. For more information, see the [CBI study on Trends in the Apparel market](#). Aside from these general trends, the Pants market has its own, segment-specific trends:

Fashion Trends include wide, flared and statement styles

Women's pants fashion for 2020 offers a huge selection of models, a [richness of colours and finishes and various lengths](#). Wide, flared, and relaxed-style trousers are making a comeback in both the Men and Women's segments, competing with the skinny styles that have been very popular over the last decade. Other styles that are becoming popular are [high waisted and paper bag pants](#) (high waist tied pants), cargo pants, classical trousers, pants with folds or turns, and cropped pants, as well as shorts.

In many cases, the trends need an individual approach through each pant looks a bit different and gives the impression of being customized. This gives room to manufacturers who customized their pants according to the customers demand given through an online web shop and manufacturers who have capacities to somehow individualize pants (e.g. through different washing methods of embroidery).

Nevertheless, pants trends are very dynamic, especially in term of women's trousers and change every season. It is therefore important to observe the market continuously and offer a broad variety of fabrics and pants style.



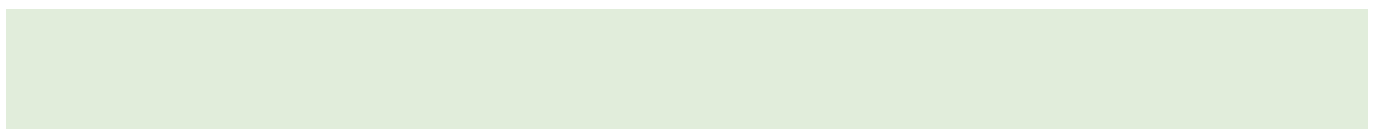
Eye-catching colours and prints are becoming increasingly popular

Other fashion trends include statement trousers with [eye-catching, bold and vibrant prints](#), such as leopard leggings, snake-prints, colourful harem pants, metallic skinnies, wide-legged and boot cut colour-blocking trousers. Up and coming trouser materials and patterns include mesh, houndstooth and leather. Likewise, light and alternative materials are gaining increasing attention, while denim trousers are not losing stake.

Manufacturers are thus required to provide clothing companies with fresh and wild patterns and alternative materials. Due to the dynamics of fashion trends, the customer's preference can change anytime, but especially floral, leopard and striped patterns are "all timers" and have a consistent presence in the pants market.

Growing alternative sub-segments

New brands are coming up focusing on pants for specific purposes like sports and business. For example, market observers expect the yoga pants market to build a USD 48 billion industry worldwide due to the increasing preference of (young) women to wear leggings instead of jeans. In the last few years, the trend of "activewear" or "athleisure" has started to drastically influence the traditional pants market. Leaders in the market are sportswear players like Nike and Adidas and new (digital) brands, and other clothing brands are also joining the trend.



Tips:

Adjust your pants styles according to the trends, i.e. by introducing wide leg and high waist models in fashionable materials and patterns.

Experiment with Direct-to-Consumers sales alongside your Business-to-Business activities. You can sell through your own web shop, existing online platforms or through social media. We have seen that the customisation of pants and the alternative sourcing of pants have become increasingly interesting for consumers. Manufacturers can thus use this trend to develop a direct link to the customer.

Familiarise yourself with the latest fashion trends on social media by following the fashion influencers and/or leading European pants players. Consult [Feedspot for the list of the Top 100 European Fashion Bloggers](#).

Observe pants threatening trends such as athleisure to be fully aware of upcoming market changes. If you are able to become part of such trends, use the circumstances to expand your capacities.

Decide if you prefer to distribute high-quality pants for selected brands or mass products to big European chains like C&A, H&M, Zara and others. Be aware of certifications needed and inform yourself about concrete contract conditions before you collaborate with either or both company types.

Keep the sustainability trend in sight. Even known “old-school” brands are switching to sustainable materials to be able to advertise their eco-friendly approach. The demand for such products is expected to increase significantly in the future.


Visit websites, web shops and check fashion magazines (for example [InTouch](#), [Vogue](#), [Glamour](#), [GQ](#) and [Men’s Health](#)) from Europe to be up to date on current pants trends.


This study has been carried out on behalf of CBI by [M-Brain GmbH](#).

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